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See [Change Log](#) for summary of changes.



# Interaction Process Automation Monitor

## Printed Help

### Abstract

This document contains the application help for Interaction Process Automation Monitor.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

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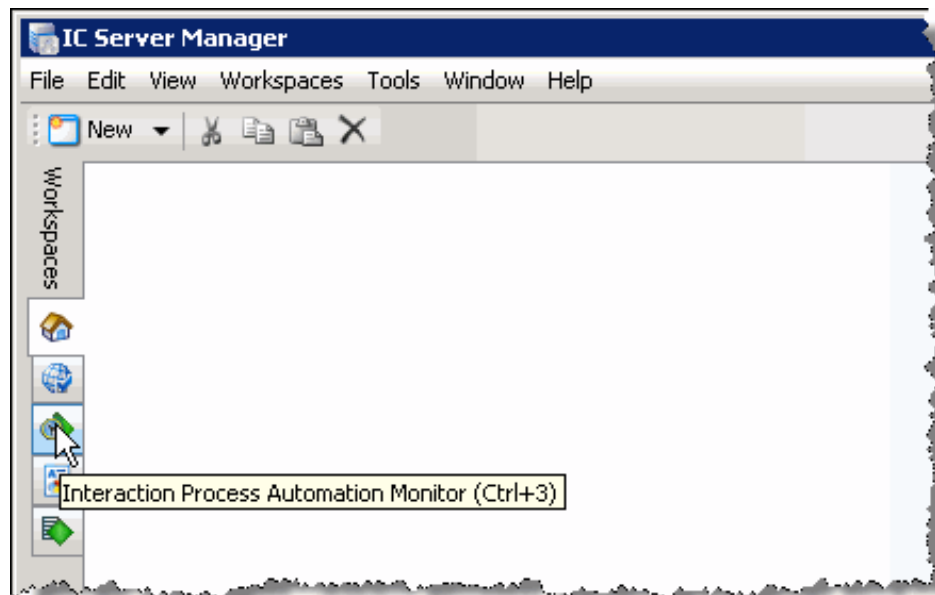
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# Starting IPA Monitor

To start the IPA Monitor:

In either IC Business Manager or IC Server Manager, do one of the following:

- Click the **Interaction Process Automation Monitor** tab along the left edge of the window.



- On the **Workspaces** menu, click **Interaction Process Automation Monitor**.

IPA Monitor appears in the workspace.

# About Process Automation Server

The Process Automation Server (PAS) runs processes that were created in the Interaction Process Automation Designer. PAS sends information about workflows to IPA Monitor.

There are two versions of Process Automation Server, v1 and v2. With PAS v2, IPA Monitor has some changes:

- IPA Monitor subscribes to no processes by default, instead of all processes.
- The IPA Monitor user interface includes filters for subscribing to processes.

**See also:**







[Subscribing to Processes](#)

# About the Process View

## Statuses

IPA Monitor displays a status icon and status text for each process.

The following is a list of statuses:

Icon	Status	Description
	Running	The process is running without error.
	Queued	Process Automation Server queued the process to launch when other processes exit and capacity becomes available.
	Error	An error occurred while the process was running.
	Cancelling	The processed is being cancelled. This status icon appears when you cancel a process from IPA Monitor. It is followed by the Cancelled icon. This status icon does not appear when you are watching a process that was cancelled by someone else.
	Cancelled	The process was cancelled and will be removed from IPA Monitor momentarily.
	Completed	The process completed successfully and will be removed from IPA Monitor momentarily.

## Modifying the Process View

You can do any of the following to modify the way that IPA Monitor displays the list of process instances:

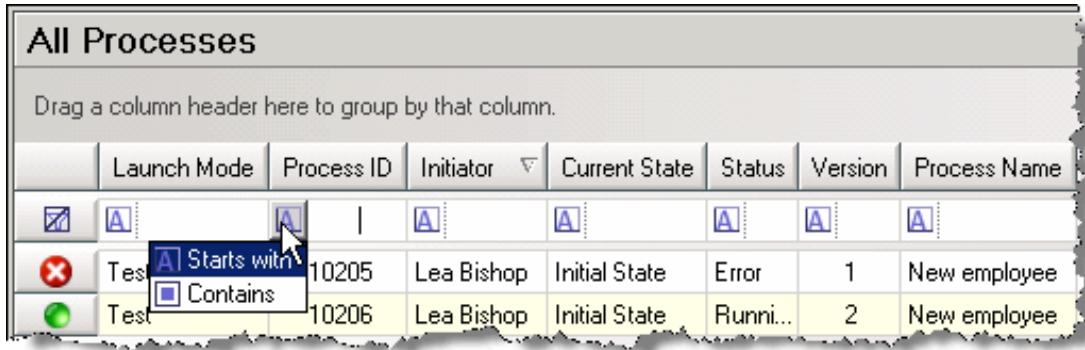
- [Modify the columns displayed in the Process View](#)
- [Change the sort order of a column](#)
- [Select a column to sort by](#)
- [Group processes in separate lists](#)

## Filtering the Process View





You can enter text or values below the column headings to filter the process data that appears. For example, you can filter the view to show all instances of a particular process, all processes in a particular state, all processes originated by a particular user, etc.

To filter the process view:

1. Click the icon in the area below the column heading to display the possible filters for that column. The icon indicates the type of data in that column.



2. The following types of filters are available:


Icon	Filter Name	Description
	Contains	Allows you to specify a string and then display only the processes that contain that string in that column.
	Starts with	Allows you to specify a string and then display only the processes that begin with that string in that column.
	Less than	Allows you to display only the processes with a value less than the value or date you specify. In a date/time column, this filter appears with a calendar control.
	Greater than	Allows you to display only the processes with a value greater than the value or date you specify. In a date/time column, this filter appears with a calendar control.

3. Click the filter you want to use, and then specify the related value. The data is filtered as you type.

### Related Topics:

[Clearing Filters in the Process View](#)

## Clearing Filters in the Process View

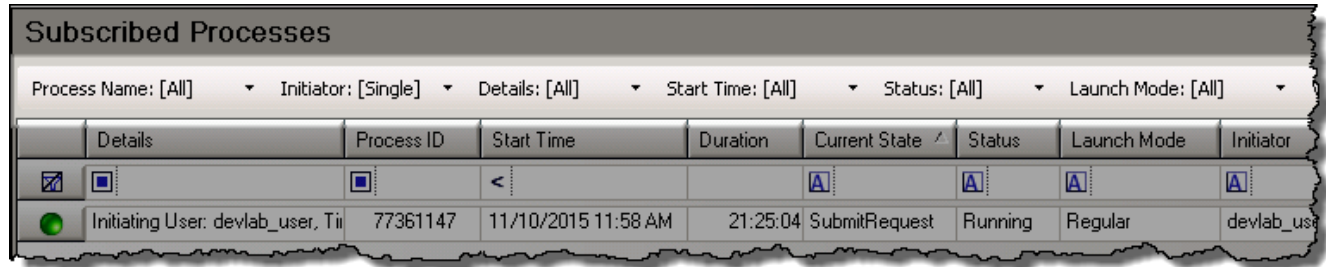
To clear any filters that you previously created, click  at the left end of the filter row.

**See also:**

[Filtering the Process View](#)

## Subscribing to Processes

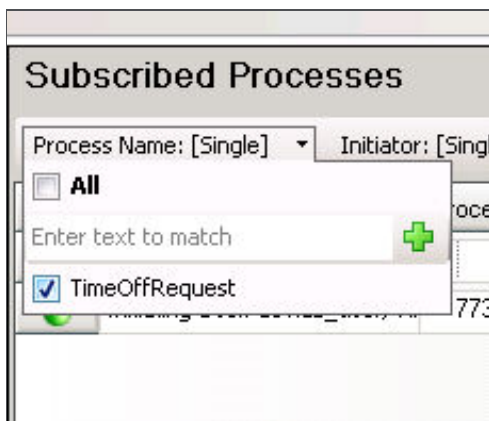
If your environment uses Process Automation Server Version 2, you can use filters to set which process data is delivered to Process Automation Monitor. Process Automation Monitor performance may be degraded if the server delivers information about all running processes to the application.



Subscribed Processes								
Process Name: [All] Initiator: [Single] Details: [All] Start Time: [All] Status: [All] Launch Mode: [All]								
	Details	Process ID	Start Time	Duration	Current State	Status	Launch Mode	Initiator
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Initiating User: devlab_user, Ti	77361147	11/10/2015 11:58 AM	21:25:04	SubmitRequest	Running	Regular	devlab_us

To add filters to the process subscription:

1. Click on the name of the filter you want to add.
2. Enter text or select a process name:



3. Repeat steps 1 and 2 for additional criteria you want to set.
4. Click **Apply**.

Process Automation Server Version 2 will now deliver only information about processes that fit the selected filters.

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## Clearing Subscription Filters

To reset all subscription filters to [all], click **Clear** and then **Apply**.

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## Reverting Filter Changes

While editing filter settings, you can revert subscription filters to their previous settings by clicking **Revert**.

Note: you cannot revert to previous settings after the changes have been applied. Reverting only works during editing.

See also:

[About Process Automation Server](#)



# Working with Processes

## Viewing Process Details

In IPA Monitor, you can view the following detail information for a process instance:

- Name of the initiating user, along with the date and time the process instance was launched.

**Note:** If a user sets the value of a time variable in the Webviewer, then Process Automation Monitor displays the time as Greenwich Mean Time (GMT), not as the user's local time. GMT is the worldwide standard time.

- ID and current state of the process.
- Launch mode (regular or test).
- Process actions.
- The process variables (sorted alphabetically by label).
- Associated interactions.
- Notes added to the process.

---

### To view the details for a process instance:

1. Right-click the process in the IPA Monitor workspace, and then click **Process Details** in the shortcut menu.

The Process Details dialog box appears. If you selected multiple processes, one dialog opens for each process.

2. Click the **Actions**, **Process Variables**, or **Associated Interactions** tab to view the related information, or click the **Notes** tab to view or add notes about the process instance.
3. Click **Close** to return to the **IPA Monitor** view in IC Business Manager or IC Server Manager.

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## Tabs

The **Process Details** dialog box contains these tabs:

<b>Actions</b>	Displays the status of the individual tasks within the process.
<b>Process Variables</b>	Displays the data variables for the process instance.
<b>Notes</b>	Displays any notes added for the process instance. See <a href="#">Adding Notes to a Process Instance</a> .
<b>Associated Interactions</b>	View the interactions (calls, chats, ACD-routed email messages, and so on), that are associated with the process instance. Or, remove a process association (requires the Manage Process right).

---

## Cancel, Retry, or Refresh a Process

You can cancel or retry a process if you have the Manage Process right.

<p><b>Cancel Process</b></p>	<p>Click <b>Cancel Process</b> to cancel a currently running process.</p> <p><b>Note:</b> After a process is canceled, its status changes to canceled and the <b>Actions</b> and <b>Process Variables</b> tabs no longer appear.</p>
<p><b>Retry Process</b> (available when one or more actions is in error and depends on user account licensing and access permissions)</p>	<p>Click <b>Retry Process</b> to restart a process that stopped due to an error.</p> <p><b>Note:</b> The <b>Retry Process</b> button attempts to retry all process actions currently indicated as being in an error state and does not actually restart the running process from the beginning. This feature is designed to assist with troubleshooting and error resolution during execution of a particular process instance.</p>
<p><b>Refresh</b> (available only after a process is complete)</p>	<p>Click <b>Refresh</b> to update the information displayed on the <b>Notes</b> and <b>Associated Interactions</b> tabs and include the most recent notes or associated interactions.</p> <p><b>Note:</b> New information does not normally appear immediately on these tabs. Typically, if you edit notes or associated interactions, you are not notified that this information has been successfully updated because it might not happen immediately. The Process Details dialog box can attempt to auto-refresh the information displayed if you edit notes or associated interactions.</p>

## Adding Notes to a Process Instance


You can add notes to an instance of a process when it appears in IPA Monitor.

To add a note to a process:

1. Double-click the process instance in IPA Monitor to display the details for the process.
2. Click the **Notes** tab.
3. Type a note at the bottom of the tab, and then click **Add Note**.

The note appears in the middle section of the dialog, along with the user ID, date, and time.

## Retrying a Process

If a process cannot complete due to an error, the error status icon  appears in IPA Monitor.

### To retry the process:

1. Select the process.

**Note:** You can select multiple processes by holding down the CTRL key and clicking each process.

2. Do one of the following:
  - Right-click the selected process or processes, and then from the shortcut menu, choose **Retry Process**.
  - Click a process to display the process details, and then click **Retry** on the Process Details dialog box.
  - The **Retry Process** dialog appears, asking if you want to retry the selected processes.
3. Click **OK** to retry the process.

## Retrying an Action with an Error

If an action cannot be completed due to an error, you can fix the error and then restart the action.

### To retry an action:

1. Display the process details.
2. Click the **Actions** tab.
3. Select the action with the error, and then click **Retry**.
4. Click **Close** to return to IPA Monitor.

## Canceling a Process



You can cancel an instance of a process, as long as you have Modify rights for that process.

### To cancel a process instance:

1. Do one of the following:
  - Right-click the process instance in IPA Monitor, and then choose **Cancel Process** from the shortcut menu.
  - Double-click the process instance to display the details for the process, and then click **Cancel Process**.
2. In the **Cancel Process** dialog box, specify the reason for cancelling the process.

**Note:** Process Automation Monitor does not require a reason when you cancel a test process.

3. Click **Submit**.

The status icon changes to , and then changes to  before disappearing from IPA Monitor.

# Miscellaneous topics

## Status bar

The status bar displays the name of the CIC server. If a process is selected, the status bar also displays any error for that process.

## Process View

The Process view displays the currently running instances of the process that is selected in the Process List. If no process is selected, the Process View displays the current instances of all processes.

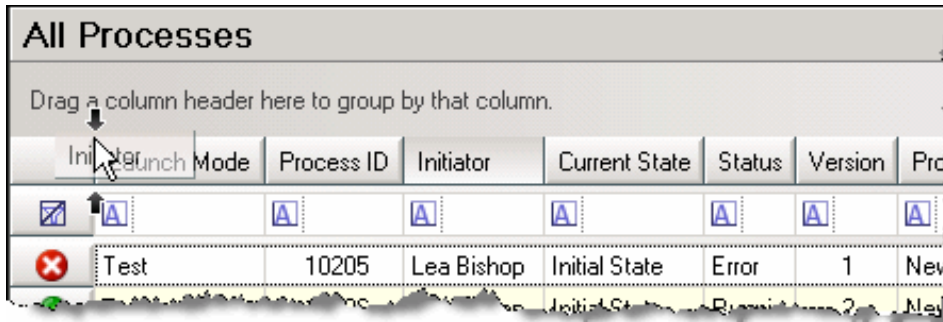
## Process List

The Process List contains a list of the available processes and indicates the number of current instances of that process. Click a process to show only that process in the workspace, or click the top node to display the current instances of all processes.

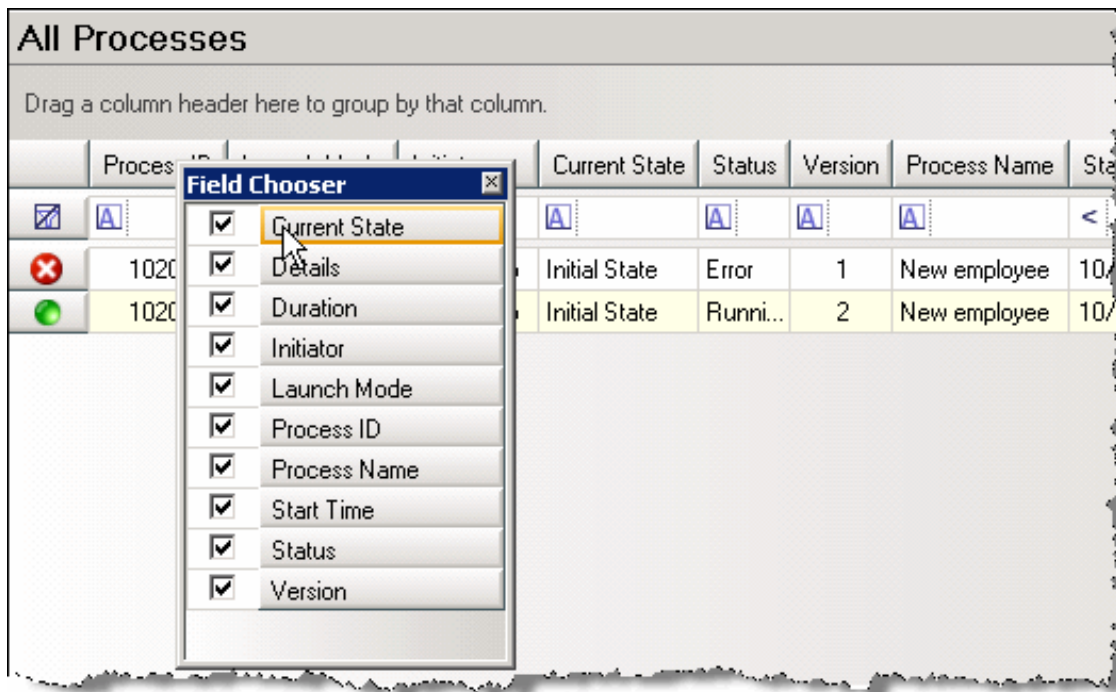
## Modifying the Columns in the Process View

You can modify the columns that appear in the Process View by rearranging columns, adding columns, and removing columns.

- To rearrange the columns in the Process View, drag and drop the column headings one at a time into a different order in the heading row.



- To add or remove columns from the Process View, you must use the Field Chooser control. To display the Field Chooser control, right-click in the heading row, and then click **Field Chooser**. The Field Chooser control appears.



- To add a column to the Process View, select the check box next to the column heading in the Field Chooser, and then drag the heading to the appropriate location in the heading row.
- To remove a column, clear the check box next to that column heading in the Field Chooser, and then close the Field Chooser.

## IPA Monitor Workspace Tab



The IPA Monitor tab appears in the list of workspace tabs in both IC Server Manager and IC Business Manager. Click this tab to display the IPA workspace.

## Heading Row

The heading row contains the column headings, which you can rearrange, click to reverse the sort order of a column, or drag to the area above the heading row to display a separate list for each entry in that column.

See [Modifying the Process View](#).

## Grouping Processes in Separate Lists

You can separate the data in the Process View into lists that you can expand or collapse. You can use any of the column headings to group the data.

You can group by a single column or by multiple columns.

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### To group by a single column:

1. Right-click the column heading by which you want to group the data.
2. On the shortcut menu, click **Group By This Column**. The column heading appears in the Group By Box above the heading row and the data is grouped by that column.

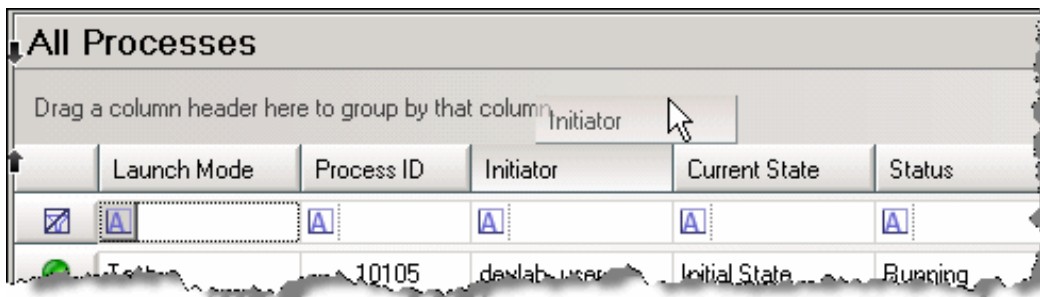
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### To group by multiple columns:

1. Right-click anywhere in the heading row, and then click **Group By Box**.

The **Group By Box** appears above the heading row.

2. Drag the column heading by which you want to group the data and drop it onto the **Group By Box**.



3. The data is then grouped by that column.
4. Drag another column heading onto the **Group By Box** to separate the items in the existing groups into sub-groups.
5. Repeat the previous step as many times as necessary to separate the data into more sub-groups.

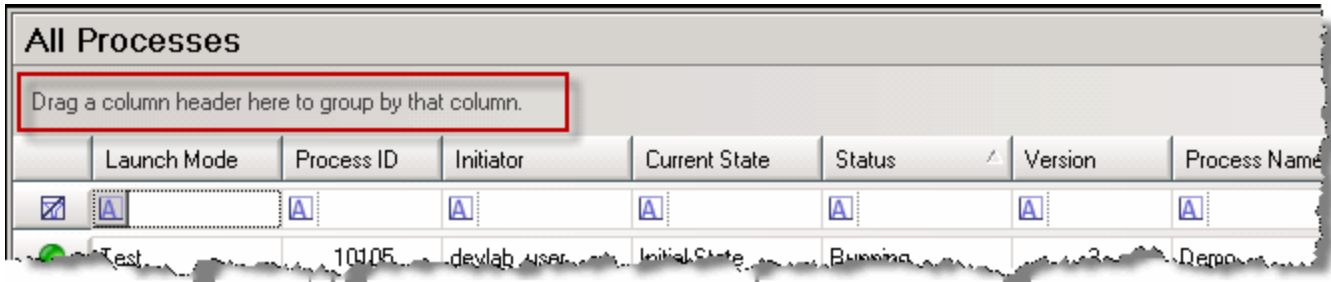
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### To remove a grouping:

- Drag the column heading from the **Group By Box** back onto the heading row.

## Group-by Box

If the Group-by Box appears above the heading row, you can drag a column heading onto the Group-by box to group the process instances in the Process view by that column.



To display the Group-by Box, right-click a column heading and then click **Group By Box**.

## Filter Row

The filter row appears below the row of column headings in IPA Monitor. Click on an icon in the Filter row to view and set filters for each column. Filters allow you to enter text or values to filter the data in that column.

See [Filtering the Process View](#).

## Changing the Sort-by Column

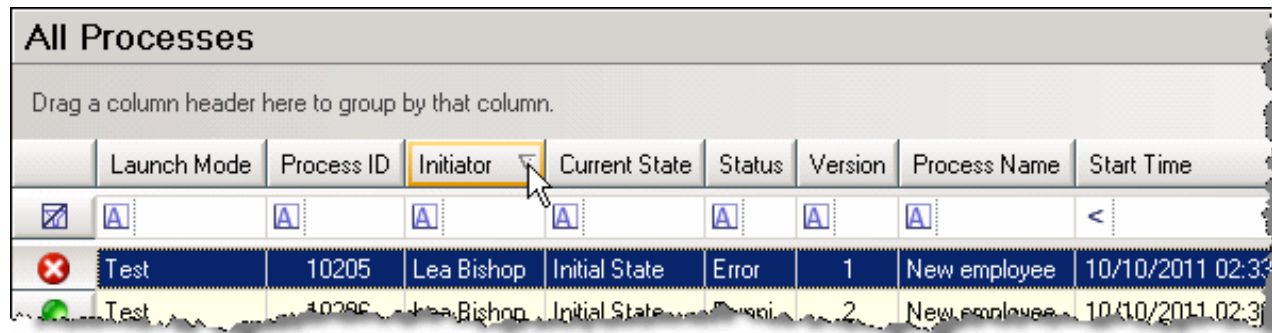
The sort-by column is the column that the IPA Monitor uses to sort the process instances that are listed in the Process View. To change the sort-by column in the Process View to a different column, simply click the column's heading in the heading row.

**Related Topics:**

[Changing the Sort Order of a Column](#)

## Reversing the Sort Order of a Column

To reverse the sort order of a column in the Process View, click the arrow next to the column heading. When the arrow points up, the data is sorted in ascending order. When it points down, the data appears in descending order. The arrow only appears in the current sort-by column.



All Processes								
Drag a column header here to group by that column.								
	Launch Mode	Process ID	Initiator	Current State	Status	Version	Process Name	Start Time
								<
	Test	10205	Lea Bishop	Initial State	Error	1	New employee	10/10/2011 02:34
	Test	10206	Lea Bishop	Initial State	Success	2	New employee	10/10/2011 02:34

### Related Topics:

[Changing the sort-by column](#)



# Change log

Date	Changes
28-February-2019	Created this change log.